PROJECT MANAGEMENT PROCESS
OVERVIEW
September 2009

Initiate the Project:
  1. **Project Portfolio Management Team** (Includes Desktop Division Manager, Regional Manager 1 and Regional Manager 2)
       a. Meet to discuss and/or approve proposed projects.
       b. Ensure business case is completed, scored and approved
       c. Approved projects are assigned to Project Managers.
       d. Identifies Sponsor
       e. Identifies and appoints, in writing, the Project Manager
       f. Identifies Project Core Team

Define and Organize the Project (Establish the Context):
  1. **Review Project Information** (Project Manager)
       a. Gather project documentation
       b. Review and Analyze project documentation
             i. Business Case
            ii. Conceptual Design Document
           iii. RFP or Bid
            iv. Vendor Documents
             v. Internet Search
            vi. Etc.
       c. Review Current Environment (if applicable)
             i. Conceptual Design Document
            ii. Support processes
           iii. Etc.
       d. Identify and document differences between current environment and the project environment
       e. Identify and contact Project Sponsor and stakeholders.

  2. **Hold Core Team Planning Meeting** (Core Team – Consisting of Sponsor, Project Manager, and Key Leaders most affected by the project)
       a. Develop Problem Statement
       b. Identify who should be on the Project Team. Identify team members by functions affected or functions that affect the project. Then assign people who are involved in those functions.
       c. Identify product requirements
       d. Determine product or services affected
       e. Identify high level risks
       f. Validate the scope of the project (What to be done, Schedule and Budget)
       g. Create project objective statement - 25 words or less. Clear, concise and complete.
       h. Identify Constraints – Develop Constraint Matrix (Scope, schedule, resources)

       i.   Determine who will make contact with each team member.
      j.   Identify reporting requirements, processes and procedures to be followed. (Governance Framework)

3. **Project Planning Team "kickoff" meeting**. (<u>Project Planning Team</u>)
   a. Contact project planning team
   b. Confirm individual roles on the planning team and time commitments.
   c. Formally announce team
   d. Meet and discuss scope of project
   e. Explain teams role in completion of the PDD
   f. Identify any missing skills that might be required on the team
   g. Discuss communication plan and team meetings
   h. Create planning team roster and publish.

Planning the Project
1. **Begin to Create Definition Document** (Project/<u>Planning Team</u>)
   a. Review Project Objective Statement
   b. Review Success Criteria
   c. Review Constraint Matrix
   d. Deliverables
   e. Key Project Framework decisions
   f. Baseline History

2. **Determine Project Deliverables**. (Project/<u>Planning Team</u>)
   a. Deliverables are tangible outputs of a project as a result of project work that fulfill the needs or requirements of the Sponsor or customers. A project usually contains 3 – 10 deliverables.
   b. Brainstorm (note pad methodology) to come up with the deliverables. Identify the final deliverable first, and then identify interim deliverables.
   c. After getting the deliverables, then describe them with an Is/Is Not list
   d. Write completion criteria for each deliverable.
   e. Validate the deliverables and completion criteria with the sponsor.

3. **Determine Planning Approach**. (Project/<u>Planning Team</u>)
   a. Will the project be done by phases, concurrent or program planning?

4. **Review the definition document as thus far completed**: (<u>Project Manager</u>)
   a. Validate with Core Team
   b. Obtain approval to proceed with the project.

5. **Create Work Breakdown Structure** (Project/<u>Planning Team</u>)
   a. Break project down into increments (brainstorm using note pad methodology). Highest priority first (Must, Should, Could and Won't)
   b. Identify major components for each deliverable.
   c. Identify tasks for each component (break down as far as needed) Code, Own and Complete each task.

d. Assign a WBS Code to each task

6. **Create the Preliminary Resourced Schedule** (Project/<u>Planning Team</u>)
   a. Brainstorm tasks by deliverables, phases, etc.
   b. Identify dependencies.
   c. Estimate the task durations

7. **Do a risk assessment**. (Project/<u>Planning Team</u>)
   a. Likelihood
   b. Difficulty in Detection
   c. Impact
   d. Create appropriate triggers.
   e. Risk management: Identify, assess, and manage.

Track and Manage the Project (Execution):
1. **Changepoint**
2. **MITAR (Monitor, Investigate, Take Action, Report)**
   a. Manage project scope
   b. Manage the project team
   c. Manage the resourced schedule
   d. Manage communications

Close Out the Project:
1. **Close out report**
2. **Close out letter**